

Broker & Team Foundations of Success



Broker Role

- o Why do I need my broker?
- o What is the role of the broker in supporting my team?
- o My broker, my coach, our plan?
- o In House Coaching vs Outsourced
- o Challenges for Teams and Brokers

Compliance

- o Keeping Up with an Ever Changing Environment
- o State License Law Requirements
- o Your Association Best Practices and Requirements
- o Advertising Compliance
- o Oversight of all transactions – Risk Averse
- o Agreements

Broker as Team Member

- o Skilled Business Management
- o Extra Eyes
- o Global Perspective and Resources
- o Business Development & Plan
- o Hiring & Disassociating
- o Conflict Resolution
- o Expansion Teams
- o Succession Planning



Challenges

- o Space Accommodations
 - o Traditional Brokerages
 - o Off Site Satellite
- o Broker's Cost of Doing Business
- o Facility Use
- o Staffing
- o Training and Development of Team Members & Staff
- o Team Member Compliance

Best Practices Policies

- o Written Team Brokerage Office Policies
- o Broker Provisions
- o Agent Provisions
- o Plan on File
- o Team Agreements
- o Compensation Profile
- o Team Member Responsibilities and Requirements



Thank You

